Distributing Environmental Documents

Project Development and Environmental Analysis Unit	Approved: 12/12/11 Version: 1.0

[Contents]

Purpose
Background
Responsibility
Resources
Procedures
Contact Information

Purpose

To help the Project Development Engineer know 1) how many hard copies and CDs of an environmental document to produce; 2) who to send it to and who to notify of its availability; 3) how to prepare distribution letters; and 4) how to use the comprehensive contact workbook to get your addresses.

Background

For decades, PDEA had a word processing assistant who prepared document distribution letters and maintained address lists for recipients. In 2011, PDEA lost this position, and Project Development Engineers had to absorb the responsibility of preparing their own letters. Also, in 2011, we started sending hard copies only to those who needed a hard copy, while most internal NCDOT staff was provided a link to Project Store where they could retrieve the document if necessary. This procedure addresses these changes and provides resources to help PDEs do what administrative personnel used to do for them.

Responsibility

It is the responsibility of the PDEA Procedures Manual Engineer (PME) to maintain all distribution form letters, the Document Quantities Estimate spreadsheet, and the comprehensive contact workbook on the Shared Drive. The PME is to make changes necessary to keep them current.

It is the responsibility of the PDE to use the form letters, the Document Quantities Estimate spreadsheet, and the comprehensive contact workbook maintained on the Shared Drive to:

- develop the distribution list for an environmental document
- exercise judgment on who should get a copy or a notification of availability
- calculate the accurate number of hard copies and CDs
- prepare his/her own document distribution letters
- prepare the required mailing labels
- coordinate with the front office administrative staff to get the document distributed
- alert the PME of any changes that should be made to the form letters, the Document Quantities Estimate spreadsheet, and the comprehensive contact workbook.

The PDE is also responsible for placing the pdf of the document on Project Store.

It is the responsibility of the front office administrative staff to do the actual mailing of the document, once documents, CDs, letters, and labels are provided by the PDE.

Resources

The following resources are necessary to follow this procedure. They are maintained on the shared drive under S:\ Start of Study & Document Distribution

- Distribution Form Letters
- Document Quantities Estimate spreadsheet
- Contact_Information.xls

Procedures

1. Use the Document Quantities Estimate spreadsheet to estimate the number of hard copies of your document and the number of CDs you need to produce by following these steps:
    a. Open the file and save it locally or under another name before you modify it.
    b. Click on the tab for the type of document you are distributing.
    c. Fill out your TIP # (row 9) and answer the questions in the following rows using the pull-down menus in the pink cross-hatched cells.
    d. Notice the legend at the top; you will populate cells according to a color code as follows:
        - BLUE, GREEN, YELLOW cells – do not change.
        - PURPLE cells -- use the suggested values or use your judgment to override based on your knowledge of the project (there are values for both copies and CDs).
        - ORANGE cells -- enter a 1 (or more if appropriate) in the # of Copies column for any agency that should receive a copy based on the individual project's issues. Use your judgment in populating the orange cells in the "# of CDs" column.
        - Pay special attention to the orange cells labeled "PDEA Development Engineer" and "Other". These will be extra copies for your shelf and for additional requests.
2. Use the Distribution Form Letters (found in S:\ Start of Study & Document Distribution\Doc Dist Letters) to prepare the letters for your project by following these steps:
    a. Open the folder named for the type of document you are distributing (e.g., Fed EA for a Federal EA).
    b. You will find three to four different letters depending on the type of document. The letters are titled:
        - Main Letter
        - State Clearinghouse (Department of Administration)
        - General Letter
        - USEPA Letter – Used to distribute the document to EPA in Washington D.C. This will only be found for EIS documents.

        Save the letters to the appropriate project folder under another name before modifying.*

***NOTE:** The Main Letter in each file takes care of the distribution to internal NCDOT staff, FHWA, and the State Publications Clearinghouse. Anyone listed in the "To" section of the memo gets hard copies. He or she gets one hard copy unless another number is specified beside his/her name. Anyone listed in the cc list does NOT get a hard copy. For them, this letter serves as a notice of the document's availability in Project Store, where they can retrieve it if necessary.

The N.C State Clearinghouse (Department of Administration) letter will take care of distribution to the following agencies within DENR, so you do not need to send them a separate copy: DENR Regional Office (Air Quality, Land Resources, Water Quality, & Groundwater); Environmental Health; Parks and Recreation; Natural Heritage Program; Forestry; WRC; DMF (depending on county); and DCM (depending on county). (This is accounted for in the Document Quantities Estimate Sheet.)

The N.C. State Clearinghouse letter includes distribution to the following agencies: Department of Agriculture; Department of Cultural Resources, HPO; Department of Crime Control & Public Safety, Division of Emergency Management – National Flood Insurance Program (CC&PS, DEM – NFIP); NCDOT's Transportation Planning Branch (TPB); and the appropriate Council of Government (COG).

The General Letter included in the file, often called the "Board letter" is used for distribution to anyone not included on another letter. This would include the Board member, local officials, additional agencies, etc. Modify this letter as appropriate for these audiences.

c. Modify each letter as appropriate:
   - Add the subject information (TIP Project No.). If you feel that a brief project description is needed, then please add it here.
   - Modify the link to Project Store. The items indicated in red in the example link below are project dependent and will be changed for each project. For standard projects, the first item in red will be "Proj." For non-standard projects, the first item will be "NSProj." The second item in red will be the letter found in front of your TIP Project Number (R,U,I,B, W, etc). The third item in red is the TIP Project Number with NO hyphen.

\\DOT\Dfsroot01\ProjStore\Proj\TIPProjects-B\B2500\PDEA\Project_Development\Documents

   - The Main Letter has one or two drop-down boxes in the Memorandum Line, depending on whether it is a Federal or State document. One drop-down box contain the names of the FHWA Preconstruction and Environmental Engineers and the second contains the names of the Division Engineers.
   - In the General Letter, change the body of the letter as appropriate for your particular situation. This letter is the only letter that you will use mail merge to fill in the appropriate names.

3. Perform a Mail Merge on the General Letter for the document. Refer to the Mail Merge procedure for additional instructions.
4. Create and Print the necessary mailing labels, again using Mail Merge.
5. Take the copies of the document, labels, and CD's to the front office for final distribution. Provide the Main Letter electronic file for emailing to the recipients on the cc list at the bottom.

6. IF you chose to distribute a document yourself, you will be responsible for assembling the appropriate packets, add labels, and place in the mail. You will also be responsible for emailing the document’s Main Letter to the recipients in the cc list at the bottom of this letter.

Contacts

- For suggestions to change this procedure contact: Karen Capps, kbcapps@ncdot.gov
- For questions about performing this procedure contact: Missy Pair, mpair@ncdot.gov ; Karen Capps, kbcapps@ncdot.gov; Tracy Walter, twalter@ncdot.gov

Record of Revision

Version #	**Reason for Revision**	**Revision Date**